



Global Horizons: Securing the 8M+ global job opportunity for India's talent by 2030

November 2024


A circular inset image showing a hand placing a blue sticky note on a calendar. The calendar has days of the week (Tue, Wed, Thu, Fri, Sat) and dates (1, 4, 5, 6, 8, 11, 18, 24, 27, 29, 30, 31) visible. There are also orange and yellow sticky notes on the calendar. In the background, there are glasses and a small potted cactus.

Table of Contents

01

8M+ overseas jobs for Indian talent: Opportunity of a decade

02

Critical structural unlocks needed to realize full potential

A blurred, high-angle photograph of a large crowd of people, likely at a public event or conference. The image is out of focus, showing a mix of colors from clothing and the general movement of the group. A semi-transparent white banner is overlaid across the middle of the image.

01

8M+ overseas jobs for Indian talent: The opportunity of a decade



India's time to act is now



Global Labor Gap

45-50
M

Labor gap in **high-income economies**

- 90%+ opportunity in **20** countries
- Driven by **blue-collar jobs** (60%) and **nursing/ healthcare**



India's Opportunity in 2030¹

1-1.5
M

Net overseas employment flow – **1.5-2x of current flows**

14-15
M

Potential stock of Indian migrant workers – **2-2.5x of today**

\$300B

Potential inward remittances – **4-5% of Indian GDP** (vs 3% today)



India's Strategic Play



Build winners in India: Replicate ITeS like success stories in healthcare, green skills/electric vehicles, domestic workers



Geostrategic partner: Position India as a trusted circular migration partner for top economies



India as global talent brand: Strategic powerhouse in key roles (e.g., manufacturing) & net new areas (e.g., care workers)



Now or Never



New destinations opening: Large opportunities in Germany, Japan, South Korea - diversify beyond Gulf, US, Canada



New competition: Philippines, Indonesia, Egypt, Vietnam, Brazil and others are catching up



Window of opportunity for India is right now: India risks losing demographic advantage to Africa in 2030s

1. The numbers are the opportunity figures in achievable scenario – the flow and stock are annual numbers, excluding movement of students, tourists and PR, Greencard holders
Source: Expert Interviews, BCG analysis

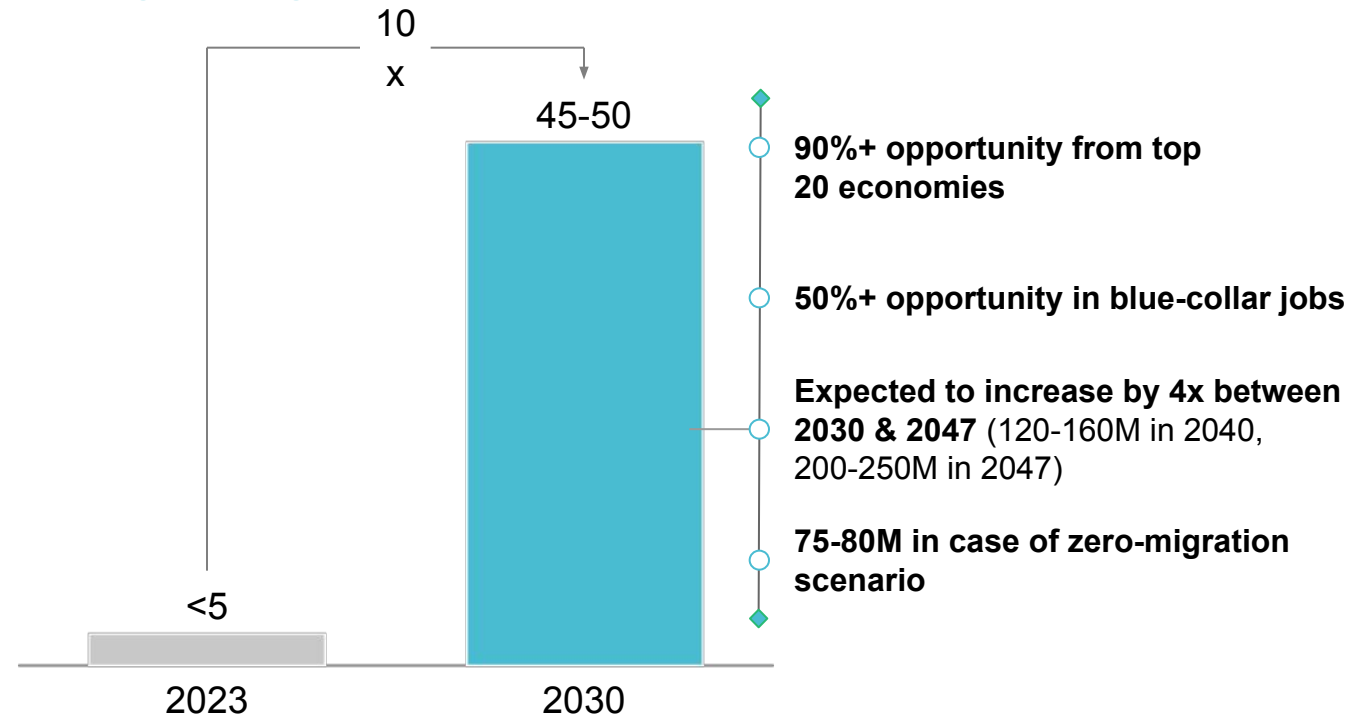
★ High-income countries could face a 45-50M labor gap by 2030 – unless more labor migration fills this gap

Key factors impacting labor gap growth

- 1 **Decrease in labor supply** due to rapidly changing demographics in key economies
- 2 **Higher need for healthcare and care workers** as the population ages
- 3 **Advancements in Gen AI** impact several jobs (e.g., routine manual/non-manual)

Labor gap expected to increase by 10x by 2030 (vs 2023)

Labor gap in high income economies (in M)¹

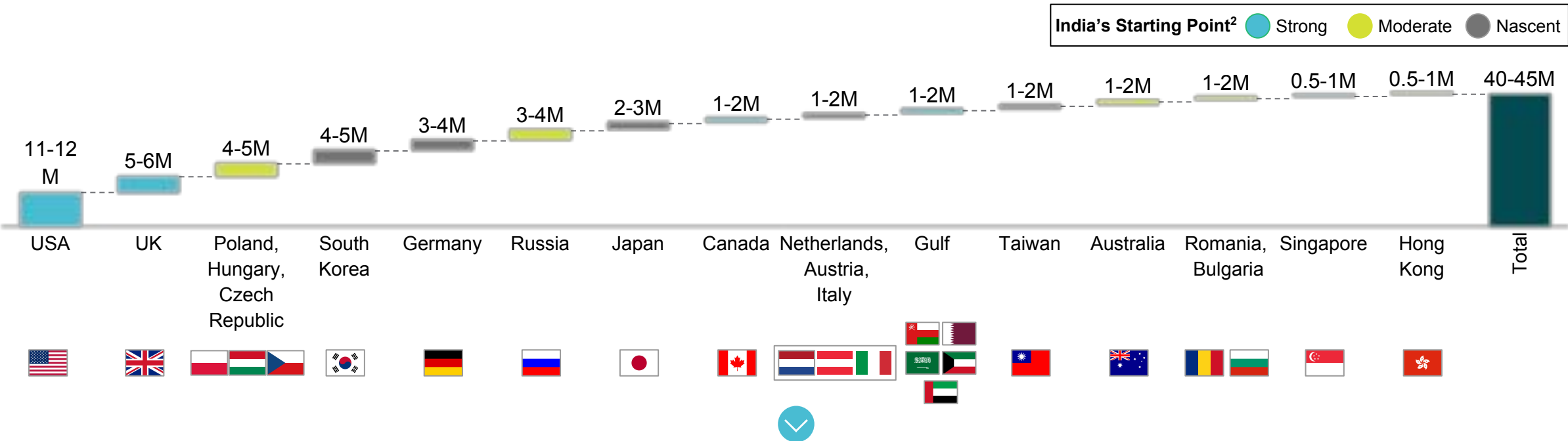


1. For countries experiencing labor gap due to supply shortages amongst analysis done for 68 high-income economies; 2. Labor Gap refers to when demand for labor is higher than local supply of talent in a country; 3. Assessment for top high-income countries; 4. UNPD Medium Scenario used; 5. Demand without impact of technology/AI, Supply is including current flow of migration; Source: World Bank, Migration Data Portal, UNPD, BCG Eurostat, DoL USA, Analyses

20 countries drive 90% (40-45M) of the labor gap; Largest gap in USA, UK with new hotspots in Germany, Japan, and South Korea

Labor gap

jobs where demand > supply, in M, 2030












India's Starting Point

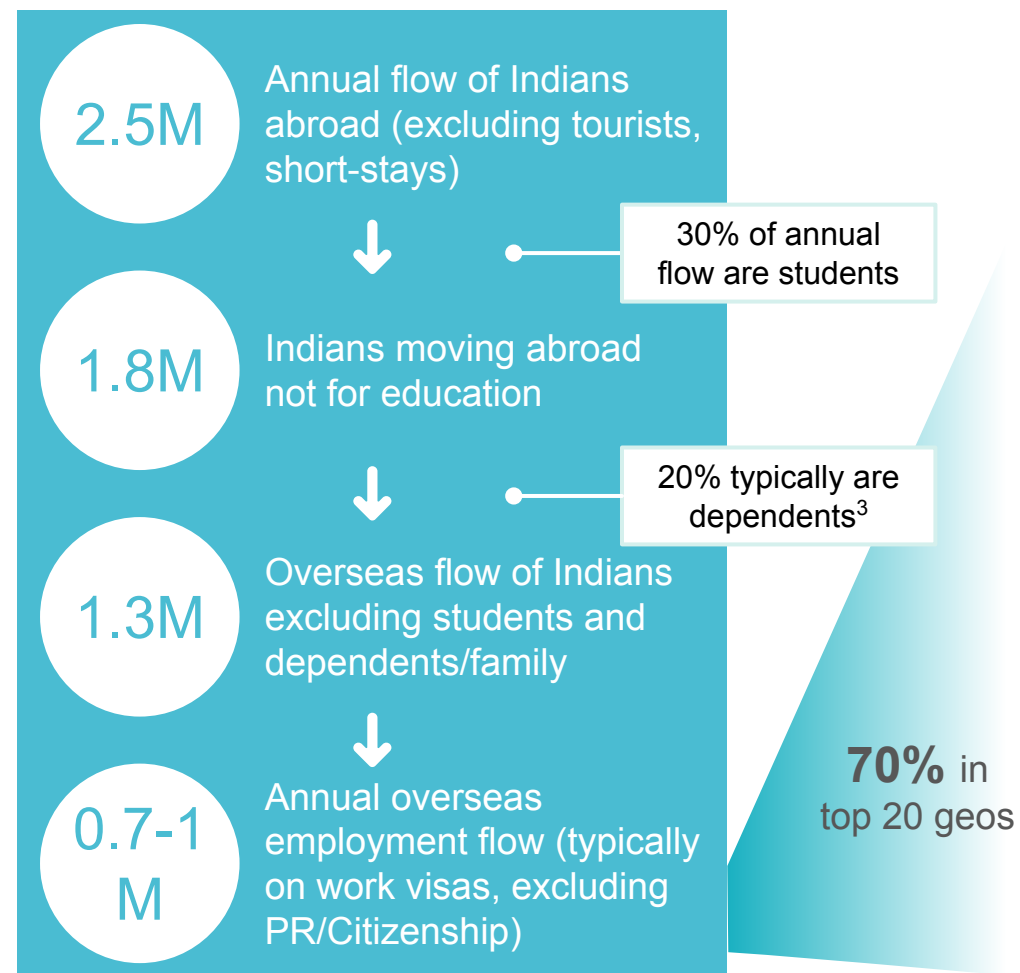
- **US, UK, Canada, Gulf, Singapore** for Indian migrants continue to be important with large current stock of Indian migrants
- **Rich supply of Indian talent** in healthcare, blue-collar; can expand beyond Gulf, Canada - **similar roles can be met in other geos**
- Traditionally closed⁴ economies **opening-up due to ageing pop. (Japan, SK, Germany & other western Europe cos., Eastern Europe, Taiwan)**

Notes: 1. Labor Gap is defined as excess demand which cannot be catered by workforce in that country, 2. Derived from volume of stock of Indians working in that country & flow of migrants, 3. Gulf countries-Bahrain, Oman, Qatar, United Arab Emirates, Saudi Arabia, Kuwait.4. Traditionally closed to large scale legal immigration of mid skilled talent
Source: UNPD, World Bank, Oxford Economics, IMF-WEO, Expert Interviews, BCG Analysis

Blue-collar jobs in manufacturing, domestic workers, transportation, and nursing will be key drivers of overseas employment

	 Blue-collar workers	 White-collar (Medium Skilled) Nursing, Teachers, Clerks	 White-collar (Highly Skilled) Business, finance, ICT etc.
 Share of total labor gap	 50% 18-20M	 20% 6-8M	 30% 10-12M
 Key roles	<ul style="list-style-type: none">• Industry & transport workers• Domestic Workers• Sales Professionals• Hospitality workers• Care workers (nannies, aged-care)	<ul style="list-style-type: none">• Clerks (office & admin)• Nursing• Teaching, etc.	<ul style="list-style-type: none">• ICT professionals• Business & finance related professionals• Other managers, etc.
 Remarks (incl. India's starting point)	<ul style="list-style-type: none">• Highly fungible skillset, India has high talent supply [pipeline in place for geos like Gulf, Canada]• Limited offshoring potential for high-income countries	<ul style="list-style-type: none">• Ageing population in high income nations driving rise in need for HC professionals• Several new country opportunities opening up like Germany, Japan, etc.• Strong starting point with nursing talent in Gulf & UK, potential to scale	<ul style="list-style-type: none">• India has strong starting position – rich talent supply & highly penetrated regions like US, UK, etc.• Medium-High offshoring potential of jobs considered

0.7-1M Indians migrate for overseas employment annually; 70%+ in top 20 countries

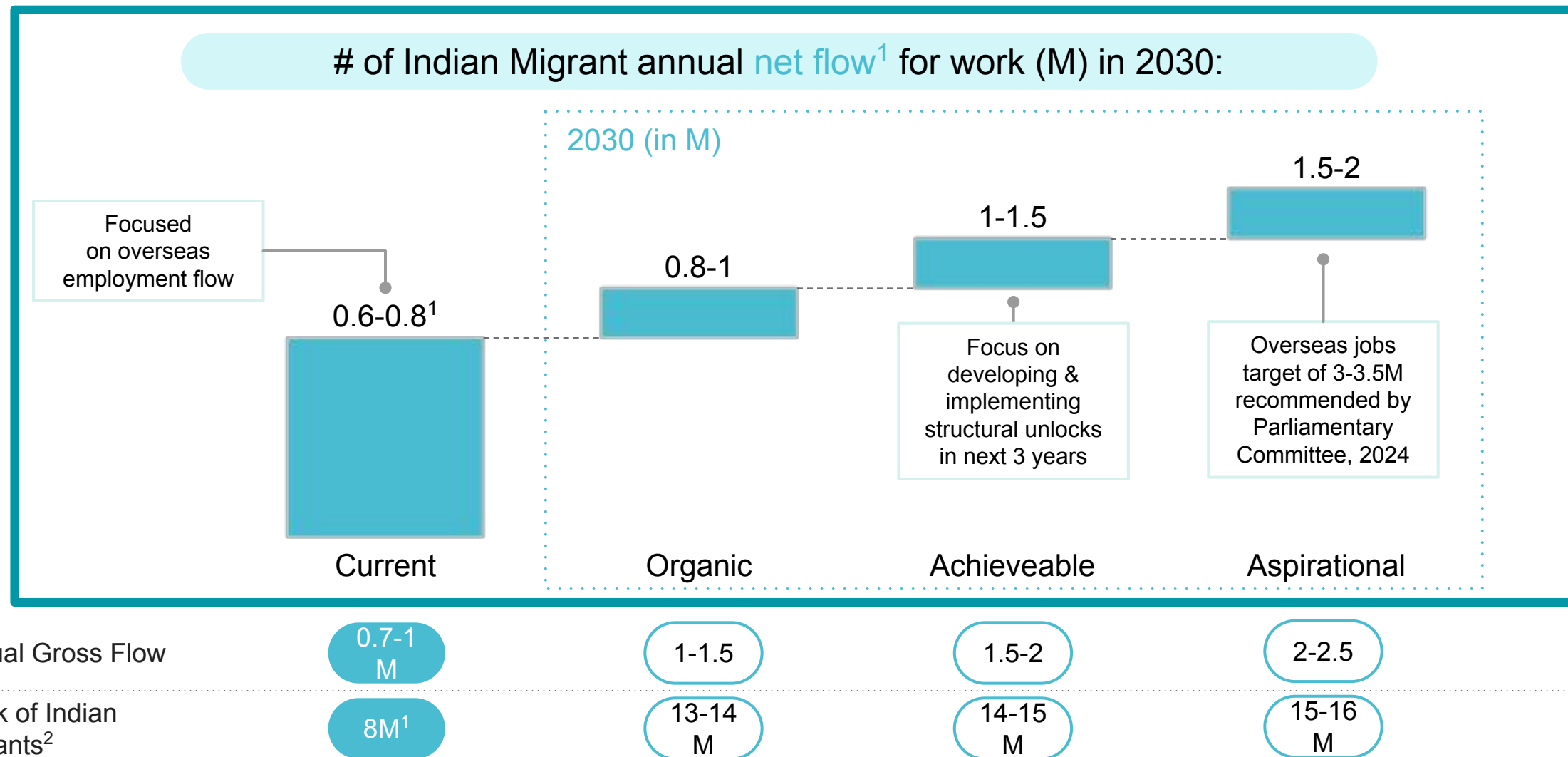


Country (Top 10)	Annual Migrant flow from India	% share of India in work visas / year ²	CAGR of # work visas issued ¹
Canada	130-140K	20-25%	
Gulf	100-110K	20-25%	
US	90-95K	25-30%	
UK	80-85K	25-30%	
Australia	60-65K	5-10%	
Germany	15-20K	10-15%	4
Japan	10-15K	<5%	
Poland	8-10K	<5%	4
Singapore	8-10K	<5%	
Italy	5-6K	10-15%	
Others ⁵	35-40K	--	--
Total	500-600K		

● <10% ● 10-15% ● >15%

Notes: 1. 2019-2023 CAGR wherever data available, else last year growth rate 2. First time work permits data from EUROSTAT used wherever data from national portals not available, 3. 40% in OECD countries, much lower in Gulf, avg. of 20% considered; 4. Estimated numbers, 5. Others includes Singapore, Hong Kong, Poland, Hungary, Czech Republic, Bulgaria, Italy, Romania, Austria, Netherlands; Source: World Bank, Press Search

India could nearly double its annual net talent flows to 1 - 1.5M by 2030



1. Avg return of Indians considered as 5-6 years for 20%; Sources: MEA, UNPD Population, Expert Interviews, BCG Analysis, 2. Does not include permanent residences, green card holders, etc.

New economies which are opening-up require lesser structural push, whereas saturated mature markets require structural G2G visa interventions to scale further

of Indian Migrant annual gross flow¹ for work (in '000) in 2030 for top 20 geos:

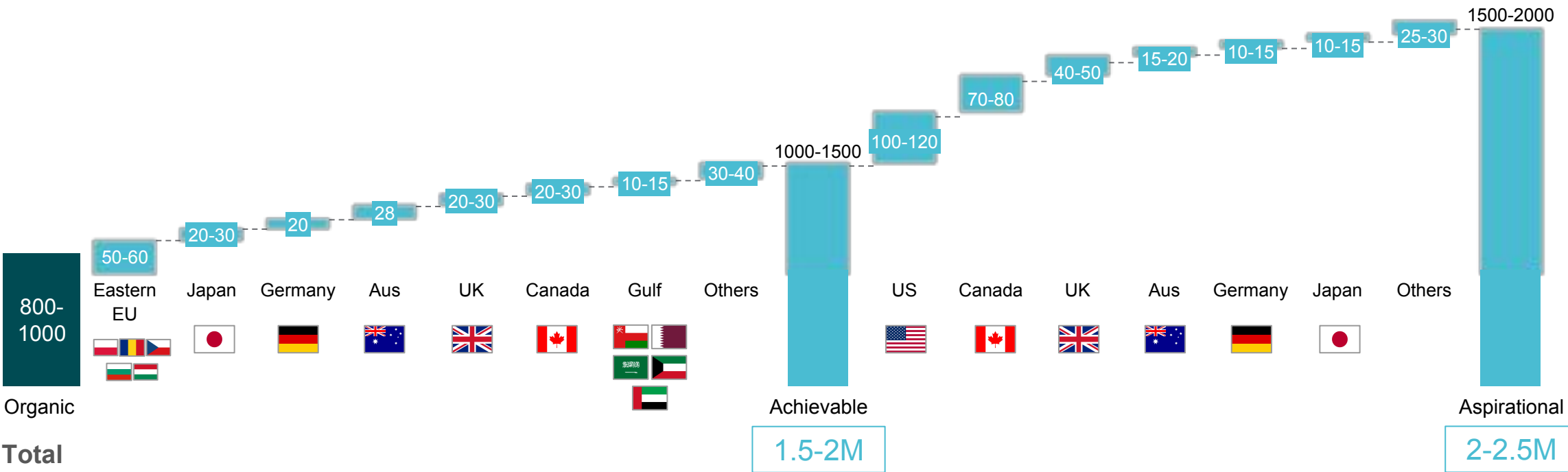


Achievable

Aspirational

Countries & professions with existing temporary visa regimes OR established migration pathways with India

Structural unlocks needed such as new visa categories / increased visa caps



1. Avg return of Indians considered as 5-6 years for 20%; Sources: MEA, UNPD Population, Expert Interviews, BCG Analysis, 2. Does not include permanent residences, green card holders, etc. 9

Several structural challenges exist that prevent India in achieving its full potential on overseas employment

Demand

- ☆ 1 Political and public **concerns over migrant's long term settlement**, altering local demographics
- ☆ 2 **Visa / bureaucratic constraints** with high cost / language / accreditation barriers to entry
- 3 **Limited & disaggregated demand from employers** with limited awareness of Indian talent

Supply

- 4 **Limited skill requirements & recognition** with Indian certifications not recognized
- 5 **Financing barriers** with prohibitive costs for immigrants and limited lending options



Binding constraints

Philippines case study: Philippines government has put concerted efforts on accelerating & facilitating overseas employment for its citizens

Philippines migration

~2.2M

Overseas Filipino workers stock 2023

1M OFWs

annual global placements

\$37B Remittances

~8.5% of the economy

Ecosystem created to drive overseas employment

Focused Nodal Agency: Department of Migrant Workers at the central government **mandated to increase and facilitate the overseas employment** of Filipino workers



Thriving private ecosystem: Enabling environment for thriving **private global recruitment industry** with **3400+ registered agencies** with growth of large organized companies that enable scale ethical migration - with multiple agencies sending **20-40K people annually**

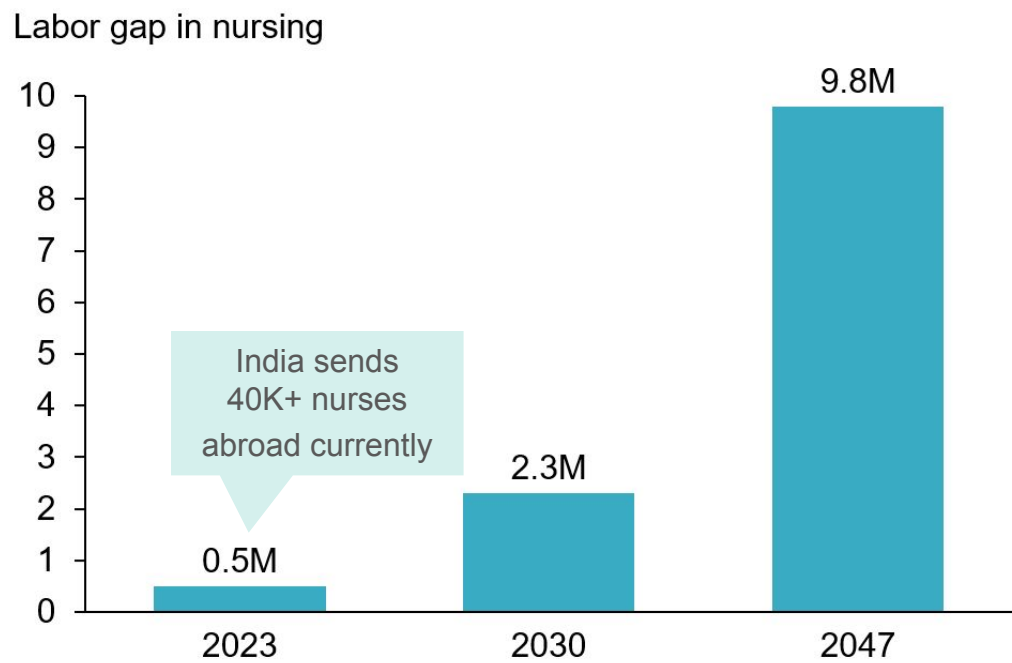
Strong foreign relations: Unlocks high demand for Filipino workers

- **65+ G2G Labor Mobility Agreements**
- **Employer interaction and marketing** in destination country, accompanied by key Filipino industry players

Skilling: Harmonization of skilling with global standards - for e.g., Nursing colleges follow U.S. based NCLEX standards; multiple partnerships with global universities

Nursing: Key global profession with labour shortages, however complex and expensive process for Indian nurses to tap into the opportunity




Nursing is a key profession with shortages & openness to global recruitment



Increasing openness for global nurses

NHS in U.K. today employs 30% non-British nurses (majority Asian) and is expected to increase

However, the process of obtaining license to operate is time consuming & expensive

Overall process	1-2 years avg. process duration	INR 3-7L expenditure	
Country requirements			
Language	ENG-IELTS	ENG-IELTS	B2 level GER
Core skills	NCLEX	CBT+OSCE	-
Language expenditure	Exam fee <i>Often multiple given low pass rates</i>	Coaching fee <i>Upto to 6 months for languages like GER</i>	Visa fee
Local certification process	Nursing Council of India license, with high variation across state approval periods <ul style="list-style-type: none">Kerala: 2 monthsKarnataka / TN: 1 monthPunjab: 3-4 months		

A blurred, high-angle photograph of a large crowd of people, likely at a public event or protest. The image is heavily motion-blurred, creating a sense of movement and energy. The colors are muted, with a lot of greys and blues, and some warmer tones from clothing or lighting. The background is a bright, hazy white, possibly representing a large open space or a very bright sky.

02

Critical structural unlocks needed to
realize full potential

Integrated strategy to unlock India's overseas potential

Horizon 1 unlocks - 'Achievable scenario'



Demand unlocks

Set ambition and make overseas migration a top G2G priority

- 1 Create **G2G partnerships** to mobilize large scale labor demand and create migration pathways
- 2 Unlock **bureaucratic visa hurdles for rotational migration** at top destinations
- 3 Drive & **Position 'Talent India'** as a scalable, quality solution for circular migration with employers



Supply Unlocks

Focus on key employment pathways for Indian talent

- 4 **Harmonize demand-centric skilling, and accreditation** for top occupations
- 5 **Formalize financing** via bridging loans and rotation funds

Horizon 2 unlocks - Ambitious scenario'

- 6 **Unlock Visa Caps and advocate for rotational migration visas** in other countries

- 7 **Design a credible return mechanisms for temporary migrant workers**

Japan: Existing temporary visa regimes; to build India brand and gain share from Vietnam, China (1/2)



Japan migration outlook

~**3M** Migrant Stock, 2022

~**300K** Labor Migrant flow, 2022
(including trainees)

24% China, 20% Vietnam

Top source countries of new labor migrants

India-Japan migration

~**13K (3-4%)** India flow of
workers, 2021

**Memorandum of Cooperation
on SSWs & multiple BLAs
between India & Japan**

Japan labor visas		Coverage	Visa numbers
Rotational visas – no path to citizenship	Specified Skilled Worker (SSW) Up to 5 years	Foreign nationals with exposure to expertise and skills in certain industrial fields {blue & white collar} 16 occupations included in SSW: nursing, cleaning, industrial work, food processing, hospitality, construction	Cap of 350K migrants set in 2019 for 5 years;
	Technical Intern Training Program visa 3-5 years	Under trainees or interns for on-the job training {Blue-collar} Care giving, construction, farming, industries	No cap, but ~400K visas issued annually
Long term visas - White collar	Highly skilled professional visa	Academic Research, Specialized/Technical, Mgmt Activities	No cap, ~600K in 2021
	Start-up visa	Foreign Entrepreneur supported by few municipalities in Japan	No caps
	Working visa {white collar}	For professional roles and jobs	No caps

Japan: Existing temporary visa regimes; to build India brand and gain share from Vietnam, China (2/2)



Key barriers to “rotational” mobility from India

- **High language & technical requirements for visas:** TITP visa requires applicants to pass **N5 Japanese language proficiency test** even for blue-collar jobs; while SSW requires N4 or higher
- **Strong push & established channels with SEA countries:** Countries like Vietnam, the Philippines, and China dominate due to cultural affinities and strong government support. For example, the Philippines has dedicated government desks in Japan to promote Filipino workers and address employer concerns
- **Assimilation Challenges:** Cultural differences and the Japanese language pose significant barriers for Indian talent, making integration and performance more difficult.

Achievable incremental India opportunity 2030: 20-30K p.a.



Push for **reduction in key bureaucratic hurdles to obtaining short term visas** – especially high language req., for blue collar workers from N5 to N4



Conduct **large scale demand generation and create brand India** with top employers in Japan to gain share from Vietnam, China, Philippines




Pilot **Japanese language, soft skills & culture training programs**, to aid placement & retention of Indian talent in Japan

Demand side unlocks

Supply side unlocks

 G2G Partnerships

 Skilling

Poland: Existing temporary visa regimes however complex & arduous visa process for Indian applicants and high language barrier to be addressed



Poland migration outlook

~1M Migrant Stock, 2022

~800K Labor Migrant flow, 2021
(increased due to Ukraine unrest)

Ukraine, Belarus

Top source countries of new labor migrants

India-Poland migration corridor

~9K (<2%) India flow of
workers, 2021

**No formal MMPA / BLA in
place** between India & Poland

Poland visa categories		Coverage	Visa caps / quotas
Long term visas	Work Permit A [3 years with extension]	While collar work - This permit is required for non-EU, non-EEA, and non-Swiss citizens who work for an employer in Poland	NA
	Work Permit B [1 year with extension]	Foreign nationals who will work as a board member in a legal entity or a limited company	
Rotational visas – no path to citizenship	Seasonal Worker Permit – Type S [0.5 years only]	Seasonal blue collar jobs like agriculture, catering, hospitality, tourism etc.	NA
	Work Permit D [1 year only with no extension]	{white & blue collar} Foreigner is employed by a foreign employer without a branch, plant or other form of business activity in Poland	

Poland: Existing temporary visa regimes however complex & arduous visa process for Indian applicants and high language barrier to be addressed

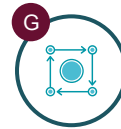


Key barriers to “rotational” mobility

- **Lengthy & Arduous Visa Processes:** Visa approvals take 5-6 months, with high uncertainty and cumbersome bureaucratic procedures – with high documentation requirement
- **Language Barriers:** Language challenges significantly hinder recruitment and visa applications
- **Low awareness of India** as a source of talent vs. neighboring countries like Ukraine / Belarus

Achievable incremental India opportunity 2030: **35-40K p.a.**

Emerging recommendations



Push for **faster visa processing** with simpler bureaucratic processes, such as set up more embassy-led Academic Evaluation centers



Conduct **large scale demand generation and India branding** with top employers in Poland to gain share from European countries



Pilot **language training programs**, esp. for blue-collar workers to assist placement of Indian talent to Poland

Demand side unlocks

Supply side unlocks

G G2G Partnerships

S Skilling

U.S.A.: Key structural barriers to work visas, such as eligibility of Indians for blue-collar visas & cap in H1B category



U.S.A migration outlook

~52M Migrant Stock, 2022

~800K Migrant flow, 2022

Mexico & India

Top source countries of new labor migrants

India-U.S.A. labour migration corridor

~95K India flow of workers, 2021

No formal MMPA / BLA in place between India & U.S.A.

Source: US govt. websites, BCG Analysis

Visa	Coverage	New Visa Issuance (in '000)	India's Share (in %)
H1B Visa {white collar}	Highly skilled with min bachelors', including nurses	65K	75%
H2A Visa {blue collar}	Seasonal agricultural jobs	310K	Not eligible
H2B Visa {blue collar}	Seasonal non-agriculture blue-collar jobs (incl. construction)	66K	Not eligible
O Visas {white collar}	Extraordinary ability in science, business, education, etc.	32K	6%
L1 Visas	Temporary Transfer of exec/manager	77K	33%

Highly ambitious structural unlocks such as inclusion in H2B category / increasing H1B quotas needed with limited upside expected

Demand: G2G negotiations and partnerships via MEA can act as a key demand generator for top destinations

Horizon 1: 'Achievable' short term unlocks



Conduct bilateral negotiations to reduce bureaucratic hurdles

- Conduct G2G partnership and advocacy to address specific country and profession bureaucratic unlocks
- Negotiate specific profession BLAs (such as the Portugal India hospitality BLA) to accelerate opportunistic migration basis destination country needs



Create brand India and drive employer awareness for Indian skills

- Conduct large scale employer outreach, targeting top employers in target markets and job fairs to gain market access, esp.in net new regions (Japan, Germany) to provide confidence on Indian talent
- Facilitate conversations embassies, high level PMO meetings, summits (G20, ASEAN, etc.), etc. to position Talent Brand "India"








Horizon 2: 'Ambitious' long term structural unlocks



Advocate for long term openness to rotational / guest workers

- Conduct long term advocacy for higher number of temporary visas to expand employment opportunities for Indian workers while addressing issues related to liability for overstays, illegal migration, and enforcement of temporary guest worker rules, assuming some legal responsibility for monitoring and compliance to strengthen negotiations.

Illustrative: Horizon 1 ‘Achievable’ unlocks by country

Country		Unlock
	Eastern Europe	<ul style="list-style-type: none"> Streamline complex & arduous visa process (current timelines 5-6 months) with more India based embassy-led Academic Evaluation centers in India and relaxation of visa requirements
	Japan	<ul style="list-style-type: none"> Conduct large scale demand generation and India branding with top employers in Japan to gain share from Vietnam, China, Philippines Push for reduction in key bureaucratic hurdles to obtaining short term visas – especially high language req., for blue collar workers from N5 to N4
	Germany	<ul style="list-style-type: none"> Negotiate removal of key bureaucratic hurdles to obtaining blue collar worker visas – especially high language requirement and documentation in German (for e.g. only German driving license accepted for logistics workers)
	Australia	<ul style="list-style-type: none"> Negotiate streamlining of visa and job offer process to reduce high costs for employee (\$2000-3000 currently) and increase in minimum salary thresholds especially for blue collar workers
	United Kingdom	<ul style="list-style-type: none"> Focus on replicating nursing success to other blue collar professions, leverage mobility partnership to lower salary thresholds and fast-track visas for other shortage list occupations like construction workers, etc.
	Canada	<ul style="list-style-type: none"> Leverage existing strong bilateral labour flows to expand to other professions, specifically nursing. Negotiate for reduced French requirements for nursing
	Gulf	<ul style="list-style-type: none"> Expand existing bilateral ties to expand hiring pool beyond semi-skilled blue collar construction and industrial workers

Supply: Debottleneck key barriers for skilling and accreditation for top occupations and roles



Skilling



UK, Germany, Canada; Nursing

- Provide **training with advanced equipment** to improve readiness for PTE/ CRNE - Canada, CBT+ OSCE – UK, NCLEX-RN/ CGFNS – USA²
- **Subsidize** high-cost bridging courses & tests
- Improve coordination with compliance req of UK, Canada & Germany

Australia, UK; Nursing

- Incorporate course patterns to reduce bridging req (e.g., ONP in UK, CAP in NZ)
- Set up Task force for course development

East Asian countries, Gulf, Eastern Europe; Blue-Collar roles in Industry & Construction

- Skill tests conducted by ITI to test abilities to do shuttering work, tiles and marble fitting and wall

All; Dynamic demand planning, Set up State Skill Development Authority/ World Skill Center in major industrial states for availability of skilled workforce e.g. Orissa

Harmonization



Intl. benchmarking; NSQF equivalence

with global standards/regional frameworks

- **Push for standardize minimum work exp.** req. across white- & blue-collar roles

UK, Germany, Australia; Nursing

- **Nationalized licensing** for nursing schools, no state involvement

East Asian countries; Transport & Construction

- Issue Indian DL in English to enable direct acceptance in multiple countries
- Awareness & compliance of labor contract terms to avoid exploitation, under payment of domestic workers

All; Blue-Collar jobs

Partner with international accreditation bodies to provide the necessary work-certifications

Language & Other trainings



Japan, Germany; Sales Prof, Clerks

- Mandate >1 **foreign language as part of core curriculum in schools, ITIs** e.g. French, German and Japanese language pilot training in 58 Delhi govt schools

UK, Singapore, Italy; Hospitality

- Leverage strong Indian diaspora, growing tourism sector to send talent to mainly English-speaking countries

East Asian countries, Russia

- Cultural/behavioral training to understand norms

Pre-Departure Orientation on legal & safe pathways, financial & soft skills

- Mandate **free soft skills, language training** at source & destination country like JPEPA
- Subsidize high-cost programs via partnerships
- In language centers (e.g. UK NCLE: German Goethe institute model)

Supply: Formalize financing and enable industry acceleration by building trust and prospect awareness



Financing



Industry Acceleration



Two key enablers to support the primary interventions

Financing: Multi-institutional support to cover for pre-migration costs & risks

- **Special low interest, bridging loans**, esp. for blue collar (National banks, NBFCs)
- Set up **rotating fund of employers** as outcome-linked financing
- Migration **Insurance schemes** to cover risks of employer, employee
- **Subsidies, grants, scholarships** for skilling by private, public org.

Industry Acceleration: For protection of trust & welfare of migrants, and reparation of workers

- Active **overseas support**, grievance redressal
- Expand existing network of **Migrant Resource centers**
- **Mandatory check of certifications** of employees to reduce employer risks
- **Agency registration** & sanctions for non-compliance
- Public & private bodies to offer **low-interest loans** for business, reskilling for returnees, **incentivizing employers** to hire

Exemplars



US funded 'upskilling' in Vietnam



Employer/ Staffing Agency-Pay model, recovered post placement



Skill Impact bonds, PPP financing

Exemplars



G2G MoUs: Same labor rights for migrants & nationals



Set up Migration Regulation Framework



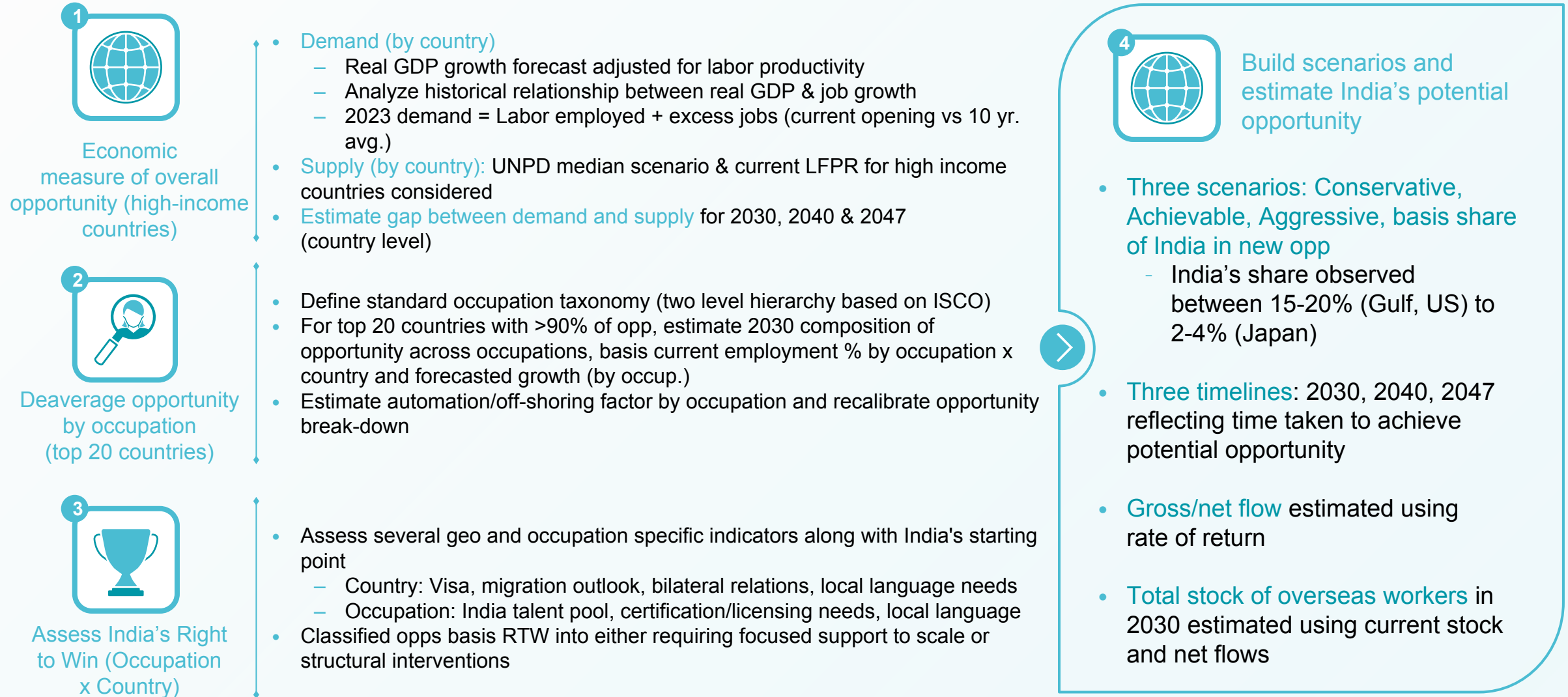
DMW & OWWA: Cash, free tickets & re-skilling support



Telangana: Returnees' profiling, financial support

Appendix

Our approach for estimating the market opportunity for India



We are leveraging perspectives from several diverse stakeholder groups and have conducted extensive research to inform our analysis

1

Private players and staffing agencies

India based

Adecco India

Urban Company
Gi Group

ALTUM

MAGNILLION

Apollo Hospitals

NORKA ROOIS

Global

工業技術研究院
Industrial Technology Research Institute
REQRUIT ASIA

NHS
MEDWING

TRUKKING

MAYS

2

Government departments and senior bureaucrats

Department of Commerce
Ministry of Commerce and Industry
Government of India

विदेश मंत्रालय
MINISTRY OF
EXTERNAL AFFAIRS

शिक्षा मंत्रालय
MINISTRY OF
EDUCATION

Philippine Overseas
Employment
Administration

FICCI

CII

3

Think tanks and professional bodies

LaMP
Labor Mobility Partnerships

WTO

ICM
INDIA CENTRE
FOR MIGRATION

BILL & MELINDA
GATES foundation

THE BROOKINGS
INSTITUTE

4

Ecosystem players (legal, skilling, financing, etc.)

CGFNS
INTERNATIONAL
FRAGOMEN

b&p
bharucha & partners

Nepal Secretariat of
Skills and Training

कौशल विकास और
उद्यमशीलता मंत्रालय
MINISTRY OF
SKILL DEVELOPMENT
AND ENTREPRENEURSHIP

FINCAP

SBI

N-S-D-C
National Skill Development
Corporation
Transforming the skill landscape

5

Global publications, analyst reports & databases

Thought leadership

Pew Research Center
International Migration
Outlook 2023

ECG
IOM
UN MIGRATION

WORLD ECONOMIC
OUTLOOK

Country Databases

WORLD BANK GROUP
S&P
CAPITAL IQ

UN
DP

KNOMAD
eurostat

MIGRATION DATA PORTAL
The bigger picture

OXFORD
ECONOMICS

U.S. DEPARTMENT OF
LABOR

6

BCG topic experts and proprietary repositories

Topic experts in international mobility, skilling, immigration in key countries (Germany, ME, Australia)

Proprietary databases and perspectives on roles of future, job/labor shortage, BCG global talent reports, country attractiveness index

Indian talent faces several challenges when seeking to move abroad for work

☆ Critical issues ☆ Other issues

Support Visa Process & Ensure Compliance

- ☆ Lengthy and complex visa processes increasing uncertainty
- ☆ Quotas in some countries/roles, deterring aspirants

Generate Demand for Indian Talent

(via G2G, marketing, large private partnerships)

- ☆ Limited outreach to generate awareness
- ☆ Unable to capture large demand in new markets due to lack of local exemplars
- ☆ Few G2G MoUs for large-scale orders

Continued Stay or Return to India

- ☆ Lack of job security and skill recognition for returnees, hindering reintegration

Assistance with Relocation & Onboarding

- ☆ Difficulty in assimilation, esp. for 1st time workers
- ☆ Lack of financing options (e.g., loans) for relocation
- ☆ Lack of oversight on working conditions & social protection

Opportunity Identification & Job Matching

- ☆ Malpractices by unregistered agencies incl. financial/job scams (1 in 2 aspirants) & high fees (INR 2-5L)
- ☆ Lack of at scale supply consolidation & job matching bw employers & aspirants
- ☆ Success stories mostly limited to Gulf & Canada, reluctance in 18-25-year-olds to explore new regions

Skill individuals to meet job requirements

- ☆ Lack of holistic knowledge & insufficient skilling programs
- ☆ Limited skill equivalency with intl. stds, requiring bridge programs
- ☆ Need for English/local language proficiency in many professions

Approach | Baseline numbers

- 1 **Basis annual visas provided to Indians in the country for work by category**, Indians working at L1 occupation split level calculated
 - MEA flow data calculated for triangulations & growth

- 2 *Considered OECD International Immigration Outlook 2023 for split by occupation (L2) of overall migrant workers* in OECD countries
 - Wherever data was not available, at complete L2 level – external search done for indicative numbers

- 3 **Derived baseline or current split of annual Indian migrant flows** by country x occupation with some additional secondary research



THE
CONVERGENCE
FOUNDATION